

Claim Listing

Claims 1 and 6-15 are now pending. Claims 3-5 have been canceled. The limitations of claims 3 and 5 have been incorporated into claim 1.

1. (Currently amended) A computerized method comprising the steps of:
 - associating each of one or more investment identifiers with an investment amount and one or more asset category identifiers; and
 - associating each of the one or more asset category identifiers with: (a) a corresponding allocation parameter, and (b) a corresponding response parameter;
 - receiving at least one input enabling a determination of the investment identifier;
 - receiving at least one input of:
 - (a) the investment amount;
 - (b) the one or more asset category identifiers;
 - (c) the allocation parameter to be associated with each of the one or more asset category identifiers; and
 - (d) the response parameter to be associated with each of the one or more asset category identifiers;
 - wherein each of respective investment identifiers uniquely specifies a corresponding investment contract;
 - wherein each of respective asset category identifiers uniquely specifies an investment asset category;

wherein the allocation parameter specifies an allocation amount to be indexed to the corresponding asset category identifier; and

wherein the response parameter specifies a relationship between (i) the allocation amount, and (ii) subsequent price, percentage return, and/or relative valuation changes in, and/or net worth changes relating to, the corresponding investment asset category; and

wherein receiving at least one input enabling a determination of the investment identifier comprises receiving one or more templates corresponding to a given investment identifier, each of respective templates setting forth a corresponding predefined allocation parameter and a corresponding predefined response parameter for each of one or more asset category identifiers.

2-5. (Cancelled)

6. (Currently amended) The computerized method of claim [[5]] 1 further including the steps of receiving a template selection, wherein the template selection uniquely specifies one of the received templates corresponding to the given investment identifier; and the template so selected is then applied to an electronic investment contract associated with the given investment identifier.

7. (Currently amended) The computerized method of claim [[5]] 1 further including the step of inputting a predefined condition to be associated with a specified one of the received templates, such that the specified one of the received templates is automatically applied to an

electronic investment contract associated with the given investment identifier upon occurrence of the predefined condition.

8. (Original) The computerized method of claim 7 wherein the predefined condition is at least one of:

- (a) an occurrence of: a specified price, percentage return, and/or relative valuation of, and/or change in net worth relating to, one or more investment asset categories;
- (b) an occurrence of a specified date and/or time; and
- (c) an occurrence of an event.

9. (Previously presented) The method of claim 1 wherein each of the one or more corresponding electronic investment contracts is held by a corresponding investor.

10. (Previously presented) The method of claim 9 further including the step of determining an overall monetary value for one or more of said corresponding electronic investment contracts.

11. (Previously presented) The method of claim 10 wherein each corresponding electronic investment contract defines a financial relationship between said corresponding investor and a contract administrator such that, upon demand, the contract administrator shall convey the overall monetary value of the contract to said investor.

12. (Previously presented) The method of claim 9 further including the step of calculating an aggregate position for an asset category by consolidating allocation parameters and response parameters associated with said asset category.

13. (Original) The method of claim 12 further including the steps of calculating aggregate positions for each of a plurality of asset categories.

14. (Original) The method of claim 13 further including the step of using the calculated aggregate positions to automatically generate purchase and/or sale orders for any of (a) futures contracts, (b) swaps, (c) contracts for differences, (d) securities, and (e) other financial instruments.

15. (Previously presented) The method of claim 14 further including the step of using the calculated aggregate positions to generate purchase and/or sales orders so as to enable the contract administrator to hedge the payment obligation.